Service Bench Instructions for Warranty Claiming

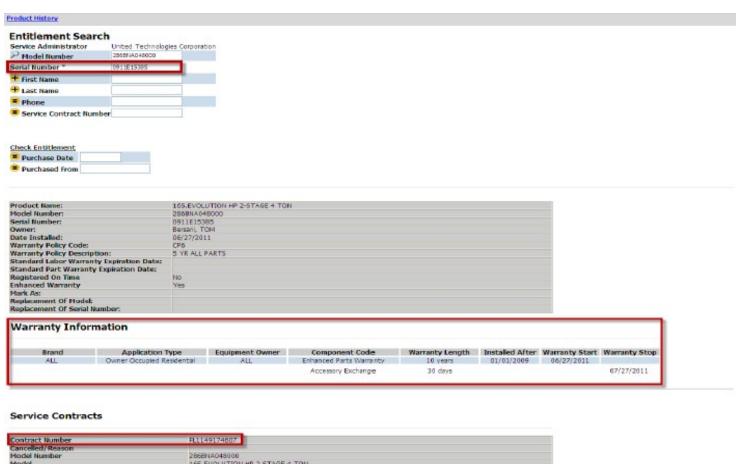
CEMA WARRANTY TEAM

Phone: 866-902-4822 Option 5 Fax: 804-521-2760

cma.warranty@carrierenterprise.com

Warranty Check/Start New Claim

- ❖ Hover over to Claims-Select Entitlement and check green check mark
- ❖ Enter serial number only** and search (in the event there are multiple models having the same serial number a list of those models will be presented and selection is necessary) ***Always choose the shorter number for outdoor units***
- ❖ All information for the number will be displayed. If registered, homeowner info and warranty length will be shown
- Optional coverage (purchased) is displayed, including contract number, homeowner information, plan description, contract effective dates
- ❖ If already registered, check product history for any claims. Claim history for the specific serial number will be displayed. If not a duplicate, go to new claim
- ❖ If not registered, Enter install date and application type and Search. Select new claim



Plan Number L10818J	Plan Type Labor	Plan Name 10 LBR HP-FNOL PLN 8 31	Contract Start Date 07/28/2011	Contract End Date 06/27/2021
Date of Purchase		06/27/2011		5-1-15-15-1
Phone		315-432-3266		
Address		119 SOTHERDEN DR LIVERPOOL, NY 13090		
Owner		Bersani, Tom		
Serial Number		0911E15385		
Model		16S, EVOLUTION HP 2-STA	GE 4 TON	
Model Number		286BNA048000		
Cancelled/Reason				
Contract Number		FL1149174607		

Standard Claim in Service Bench

Prior to claim entry, verify all information (invoice, actual part# ordered, bulletin) and have paperwork available

- Start claim from Entitlement-Hover over to Claims-Select Entitlement
- Select green check mark and enter **Serial Number Only** and enter
- Verify warranty. Check product history. If claim should be submitted, proceed to new claim
- Reference Number- Choose a number that you can reference credit. Ex. Po#, home owner last name, etc.
- Select warranty Type=Standard Warranty
- 2. Enter install date if not auto-populated
- 3. Complete customer information section if not auto-populated
- 4. Select application type-Residential, Other Residential (apartments, rental property) or Commercial
- 5. Select original equipment owner Y/N
- 6. Enter failed date and repair date
- 7. Enter failed part and replacement part information. Magnifying glass look-up tool available. Serial number required for all compressors
 - ***Compressor claims only**** Failed compressor part number must be the same as the replaced compressor part number
- 8. Replacement part invoice number is required. (Carrier billing order# not po#)
- 9. Indicate the causal part (which part caused the failure)
- 10. Select appropriate Labor Repair Type for DOA
- 11. Provide a complete description of service performed. This is critical information necessary to process claim. Why was the service call made? What was found to be wrong? What was done to repair unit or correct problem?
- 12. Hit SAVE-to enable system to auto-populate the appropriate Component code
- 13. Select the appropriate defect code

 At this point, system will also identify any problems with your submittal data

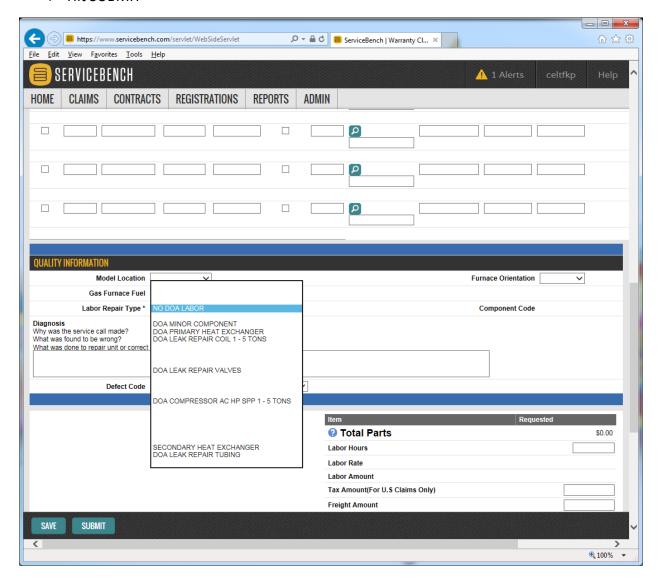
 Make any necessary corrections
- 14. Hit SUBMIT
- 15. If part needs to be returned, system will attach parts packing slip

Standard Claim

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Distributo	or				95 - ADMIN TES		FOR	Distributor I			556694995 - AD			
Reference				FLA1	7.0712.712.5	. 010 11400		Distribution 1			000071333 112	1211120102011		
				FV4CNB00	6T00			Competi	itivo Equipmor	.+				
Model Number* Serial Number				2811A81834			Competitive Equipment Stock Unit							
Warranty		1			Warranty 🗸				d/Startup Da	to 2	02/01/2012			
			pulate the unit	registration infor				One Instanc	a, ocurcup bu	.c. <u>Z</u>	02/01/2012			
Customer		tion 3												
Company First Name				Tom				Last Name			Bersani			
Address L				119 Soth	erden			Address Line	e 2		Dersam			
		ce, Postal Cod	le*		NY 13090									
Country *	•			UNITED S										
Email Phone 1*				tom.bersani@carrier.utc.com 3154326846			Phone 2			3154323266				
Application		4			ccupied Resident	tial		Installing Ho	omeowner	5	Yes			
Couries D	- 4: T6-													
Service De Fail Date*		rmation		02/15/201	2			Repair Date	* 6		02/15/2012			
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		ition Number						Crodit C	ard Payment					
			fill in the New	Model and Serial	fields			Credit C	ard Payment					
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Replacem	ent Appr	oved Amount												
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Causal	Part	Failed	Failed Part				Replaced	Replaced	Part	Part	Part	Unit	Part	Part Price
Part	Quantity	/ Part Number	Serial Numbe	r Install Date	Part	Quantity	Part Number	Part Description	Serial Number	Invoice Number	Disposition	Price	Mark Up	Extended
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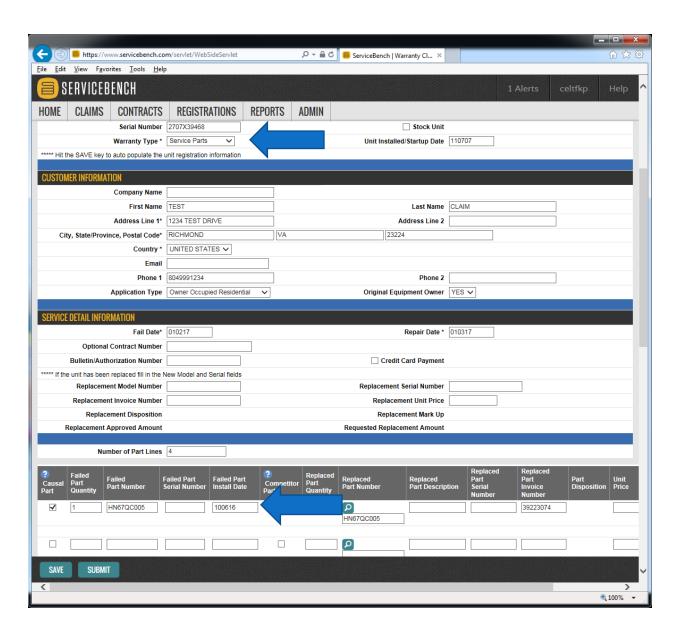
Standard Claim with Qualifying DOA Labor

- Follow same steps for standard claiming
- Select appropriate Labor Repair Type for DOA (DOA=30 days from original installation only)
- Hit SUBMIT



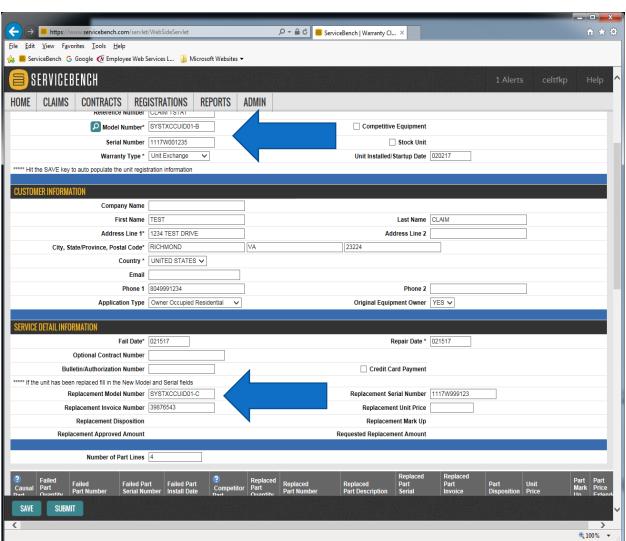
Service Part Claim on Out of Warranty Unit

- Start Claim from entitlement screen (unless repairing competitive equipment)
- Select Warranty type=Service Part
- Follow same steps for standard claiming
- ❖ A failed part install date is required for all service part claims-enter failed date on parts line (failed part purchase must be from 1 year)
- ❖ No DOA labor for service parts Hit SUBMIT



Accessory Exchange Claim

- Start Claim from entitlement screen with serial number of the failed accessory (Not ODU/IDU)
- ❖ Select Warranty type=Unit Exchange
- Fill out customer information as normal
- Enter the replacement model, serial and Carrier invoice number in the designated fields (Unit price only for Optional Labor Contracts)
- Provide a complete description of service performed
- ❖ Use Defect code **U109** for all Unit Exchange-no parts should be on claim
- Hit Submit
 - **Use for all thermostats, humidifiers, evaporator coils, air purifiers, units with compressor failure first 30 days etc. Ex. SYS, CNPV, T2, TB, TC, HUM, GAP, ZONE, etc.

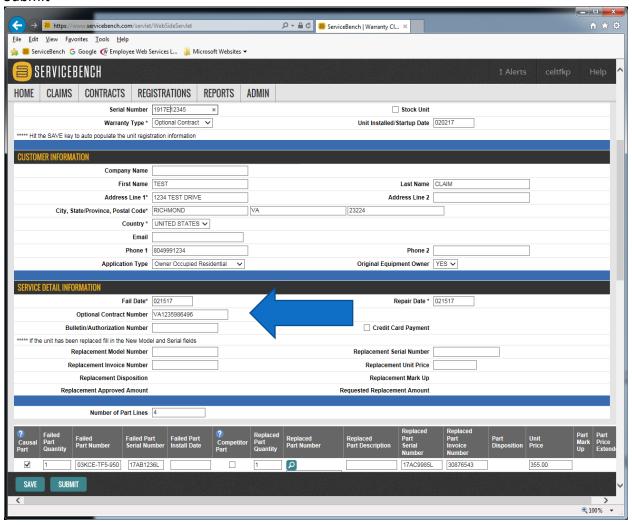


Accessory Claiming Guide

Failed Davies	DA1 - 1				
Failed Device	Model Description	Claimed As	Base Model		
SYSTXBBNIM01-,	Network Interface	Part	SYSTXBBUID01-,		
SYSTXCCNIM01-	Module		SYSTXCCUID01-		
SYSTXBBSAM01-,	System Module	Part	SYSTXBBUID01-,		
SYSTXCCSAM01-			SYSTXCCUID01-		
SYSTXBBRCT01-,	Remote Access	Part	SYSTXBBUID01-,		
SYSTXCCRCT01-	Broadband CATS		SYSTXCCUID01-		
SYSTXBBRWF01-,	Remote Access	Part	SYSTXBBUID01-,		
SYSTXCCRWF01-	Broadband Wi-Fi		SYSTXCCUID01-		
SYSTXBBUID01-,	User Interface	Unit	SYSTXBBUID01-,		
SYSTXCCUID01-	Controller	Exchange	SYSTXCCUID01-		
SYSTXBBUIZ01-,	Zoning Control	Unit	SYSTXBBUIZ01-,		
SYSTXCCUIZ01-		Exchange	SYSTXCCUIZ01-		
SYSTXBB4ZC01-,	Zone Damper	Unit	SYSTXBB4ZC01-,		
SYSTXCC4ZC01-	Control Board	Exchange	SYSTXCC4ZC01-		
SYSTXBBSMS01-,	Smart Sensor	Part	ZONEBB_KIT01-,		
SYSTXCCSMS01-			ZONECC_KIT01-		
SYSTXBBRRS01-,	Remote Room	Part	ZONEBB_KIT01-,		
SYSTXCCRRS01-	Sensor		ZONECC_KIT01-		
ZONEBB_KIT01-,	Zone Kit	Unit	ZONEBB_KIT01-,		
ZONECC_KIT01-		Exchange	ZONECC_KIT01-		
T6, T2, T1, TP, TC, TB,	Thermostats	Unit	T6, T2, T1, TP, TC, TB,		
TSTAT Series		Exchange	TSTAT Series		
P SERIES	Totaline	Part	AC, HP, FURNACE		
THERMOSTATS	Thermostats				
DAMP SERIES	Dampers	Part	ZONEBB_KIT01-,		
			ZONECC_KIT01-		
GAPA SERIES	Air Purifiers	Unit	GAPA SERIES		
		Exchange			
AIRA SERIES	Electronic Air	Unit	AIRA SERIES		
	Cleaners	Exchange			
EAC SERIES	Electronic Air	Unit	EAC SERIES		
	Cleaners	Exchange			
HUM SERIES	Humidifiers	Unit	HUM SERIES		
		Exchange			
UVLB_, UVLC_ SERIES	UV Light	Unit	UVLB_, UVLC_ SERIES		
		Exchange			
UVLXXRPL1020-A10	UV Replacement	Part	UVLB_, UVLC_ SERIES		
	Lamp				

Optional Parts and Labor Claim

- Start Claim from entitlement screen-copy optional contract number
- Select Warranty Type=Optional Contract
- ❖ Fill out claim as normal
- Enter optional contract number that was copied in optional contract# field
- Fill out parts line as normal
- Enter cost for replacement part in Unit Price on parts line
- Leave Labor Repair Type set to No DOA Labor
- Provide a complete description of service performed
- Enter refrigerant pounds (compressor only), tax (if applicable) and service materials per policy
- Save claim for defect code and identify any problems with your submittal data and Hit Submit



Common Claim Errors

- Install date before ship date-Check the ship date in entitlement and verify purchase date
- Proof of install-installation date is past warranty threshold. POI will need to be attached to claim Ex. 2006 unit installed in 2012
- Invalid Component code-Part is not a part of the unit listed or part is not a covered warranty part. Ex. Compressor is not in a furnace Ex. Doors, nozzles... Claim not warrantied parts
- Repair exceeds normal limits for unit-Multiple claims within 30 days or more than 3 labor claims within 3 months.-must put explanation in NEW COMMENT FIELD and DSM will review claim
- ❖ <u>Duplicate Reference Number</u>-Same reference number used on another claim. Save as new claim and alter the reference number and submit claim
- Failed Serial Syntax does not match Failed Part-Serial# listed is incorrect. Verify format and make corrections
- ❖ Part not listed in part lookup- Verify correct part number is being entered and if part is FAP part (factory authorized part) If so, verify if should be claimed as an unit exchange Ex. SYSTXCCITC01 is a unit exchange
- **Duplicate Claim**-Identical claim has been submitted. Check product history to verify

Customer Service is our top priority. CE Mid-Atlantic wants to make sure that you are comfortable and knowledgeable with our system. Therefore, we provide a variety of customer support options for your convenience. Please feel free to contact us with any questions you may have.

Email: cma.warranty@carrierenterprise.com Phone: 1-866-902-4822 opt 5

Should you forget your password, you can use the 'forgot password' option or you can contact ServiceBench at 1-877-472-3624 and provide your Company ID above and they can reset your account.